



PA HMIS – Client Intake

This quick reference guide outlines the components of the ClientTrack HMIS solution related to the client intake process.

Find/Add Client

The **Find/Add Client** feature is designed to enter new clients into the system, while maintaining data quality and preventing duplicate clients.

Helpful Tip: Clients are differentiated within the database by two categories: **Owned Clients** are those that were entered by the organization and can be edited & **Global Clients** are those that were entered by another organization and can be viewed only.

Home Clients Providers

ClientTrack™

Search Menu

Find/Add Client

To search the database for an existing client, click on the **Find/Add Client** icon, or enter any portion of the last name into the search field

Using a wildcard anywhere in the search text displays a list of similar results

First Name:
Middle Name:
Last Name:
Full Name (Last, First):
Social Security Number:
Birth Date:
Client ID:

If the client displays in the search results, click on the line to modify

5 records found.

First Name	Middle Name	Last Name	Suffix	SSN	Birth Date	Gender	City	Home Phone	Household	Owned By Your Organization
Neo		Andersen		XXX-XX-4153	01/01/1985	Male	Adamstown	717-243-5689	Andersen, Neo - 1985	Yes
Samantha		Anderson		XXX-XX-2119	11/29/2001	Female			Anderson, Pam - 1982	No (Global Client)
Ricky		Anderson		XXX-XX-2116	01/18/2001	Male			Anderson, Pam - 1982	No (Global Client)
John		Anderson		XXX-XX-2117	10/18/1993	Male			Anderson, Pam - 1982	No (Global Client)
Pam		Anderson		XXX-XX-2115	03/17/1982	Female	Harrisburg		Anderson, Pam - 1982	Yes

If the client does not exist in the database, create a new client by clicking here

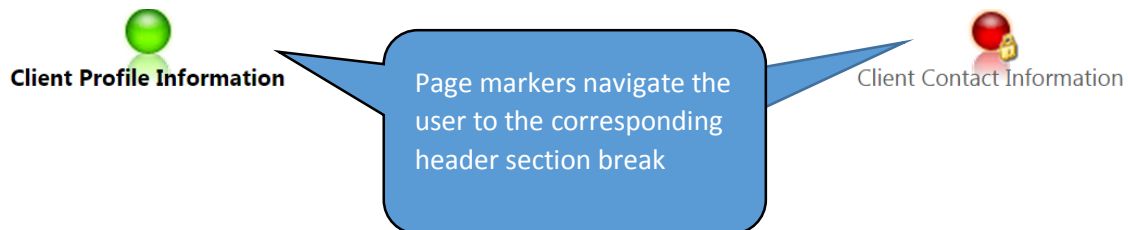
Create New Client Create New Household Cancel

If the new client is participating with other family members, add them together by clicking here

Create New Client

Helpful Tip: Only fields with a red asterisk are required to save the information

First Name:*



Client Profile Information ?

Complete the client's identifying information.

Complete as many of the fields as the client is willing to provide

First Name:*

Last Name:*

Middle Name:

Suffix:

Name Quality: ☒ Full name reported
☐ Partial, street name, or code name reported
☐ Client doesn't know
☐ Client refused

Family Information

Family:



Relationship to Head of Household:*

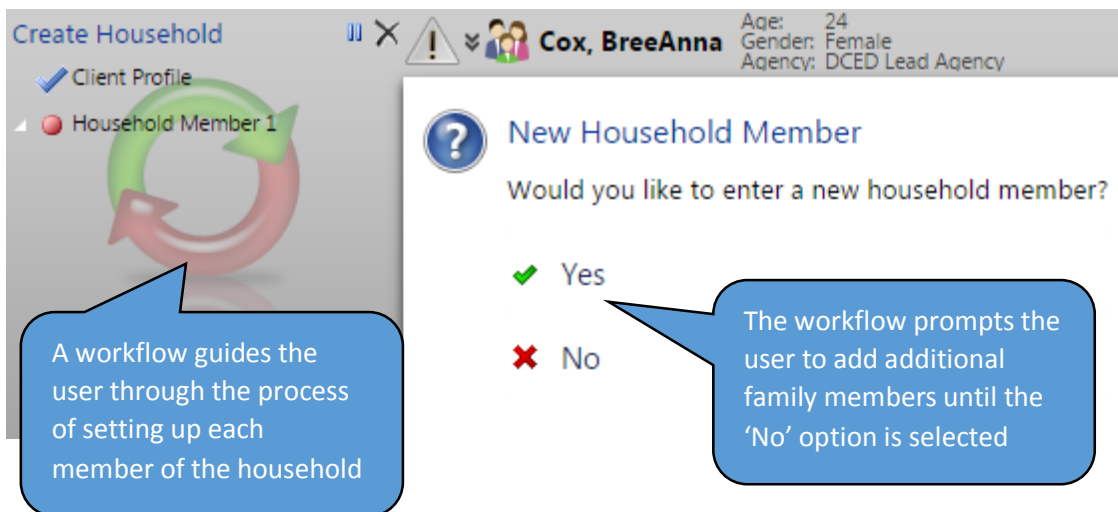
Relationship to Head of Household defaults to 'Self', if the client is not the HOH, change the selection with the drop-down menu

Create New Household

Helpful Tip: If the individual is a member of a family, ensure there has been a head of household established, or assign the client as the head of household

Family Information

Family: 
Relationship to Head of Household: * 



Create Household

Client Profile

Household Member 1

New Household Member

Would you like to enter a new household member?

☒ Yes

☐ No

Age: 24
Gender: Female
Agency: DCED Lead Agency

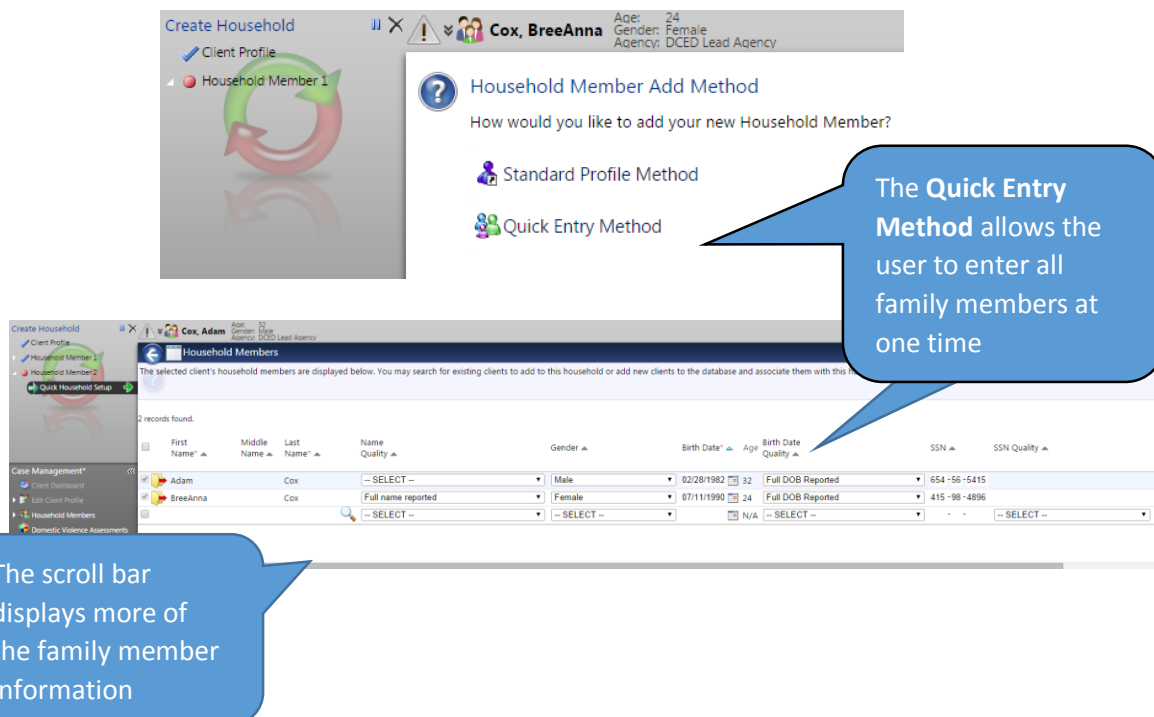
Cox, BreeAnna

A workflow guides the user through the process of setting up each member of the household

The workflow prompts the user to add additional family members until the 'No' option is selected

Quick Household Setup

Household members can be added together on the same form



Create Household

Client Profile

Household Member 1

Household Member Add Method

How would you like to add your new Household Member?

☒ Standard Profile Method

☐ Quick Entry Method

The Quick Entry Method allows the user to enter all family members at one time

Household Members

The selected client's household members are displayed below. You may search for existing clients to add to this household or add new clients to the database and associate them with this household.

2 records found.

First Name	Middle Name	Last Name	Name Quality	Gender	Birth Date	Age	Birth Date Quality	Full DOB Reported	SSN	SSN Quality
Adam	Cox		--SELECT--	Male	02/28/1982	32		Full DOB Reported	654-56-5415	
BreeAnna	Cox		Full name reported	Female	07/11/1990	24		Full DOB Reported	415-98-4896	

The scroll bar displays more of the family member information

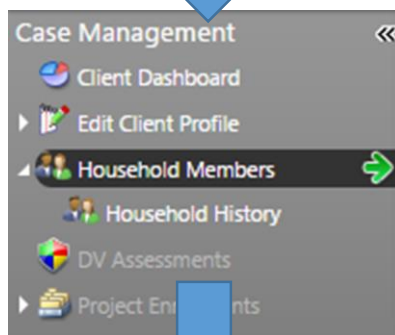
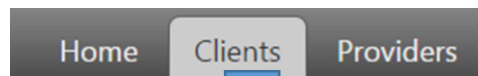
Household Members

Household members can be added manually outside of the initial intake process.

Helpful Tip: The help text built into each form instructs the user how to utilize the features.

Anderson, Pam - 1982 ▶ Family Members

The members of the selected family are displayed below. To add a new family member, click **Add New**. To edit the family member's information, choose **Edit** next to the desired record.



Household Members


The selected client's household members are displayed below. You may search for existing clients to add to this household.

2 records found.

	First Name ▲	Middle Name ▲	Last Name ▲	Name Quality ▲
<input checked="" type="checkbox"/>	Wilma		Smith	Full name reported
<input checked="" type="checkbox"/>	Jim	G.	Smith	-- SELECT --
<input type="checkbox"/>				-- SELECT --

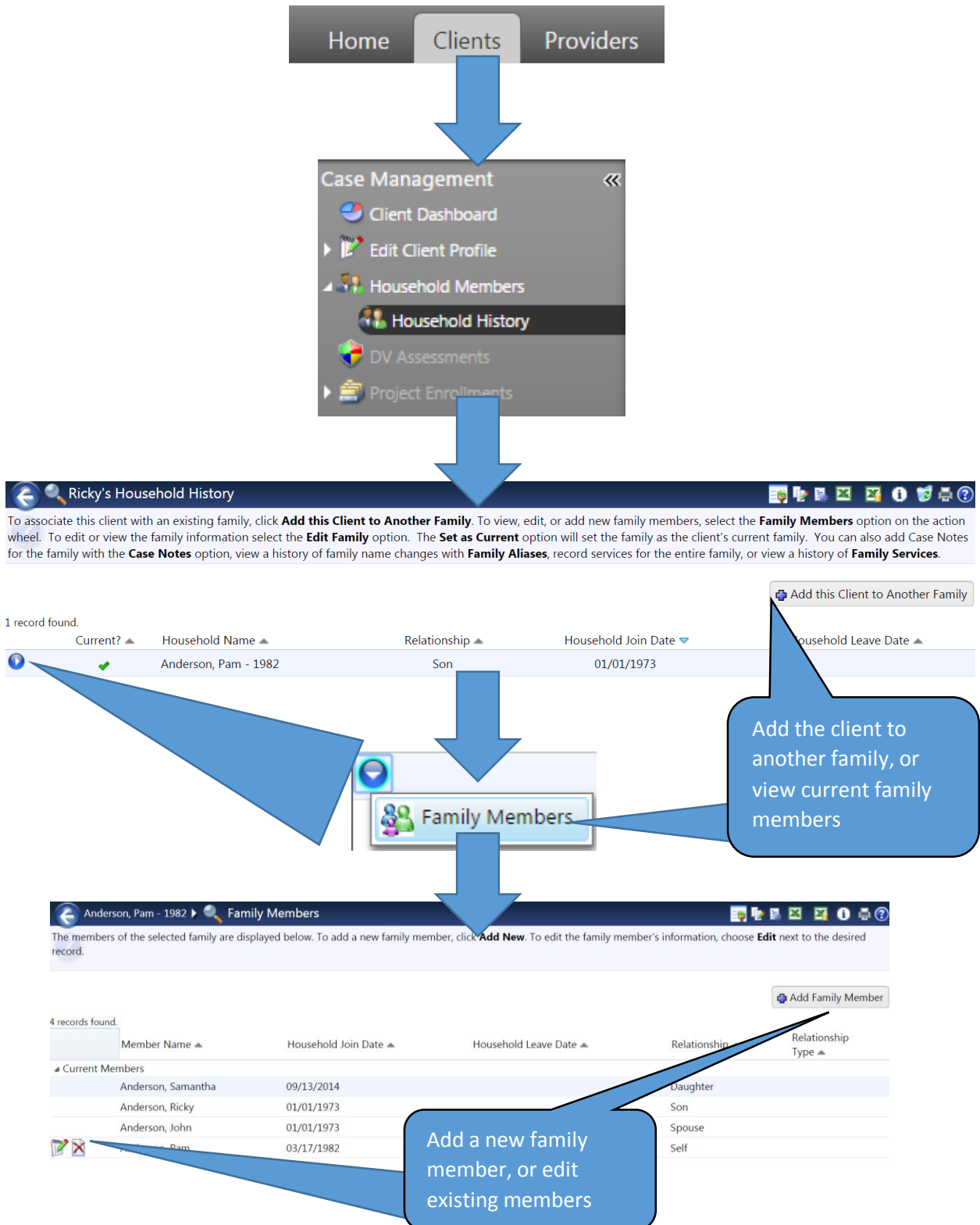
Click on the folder icon to edit a family member, or add additional members in the blank lines below

If the household is not 'owned', complete the release and import the household before editing

 You must own the current client to be able to edit the household.

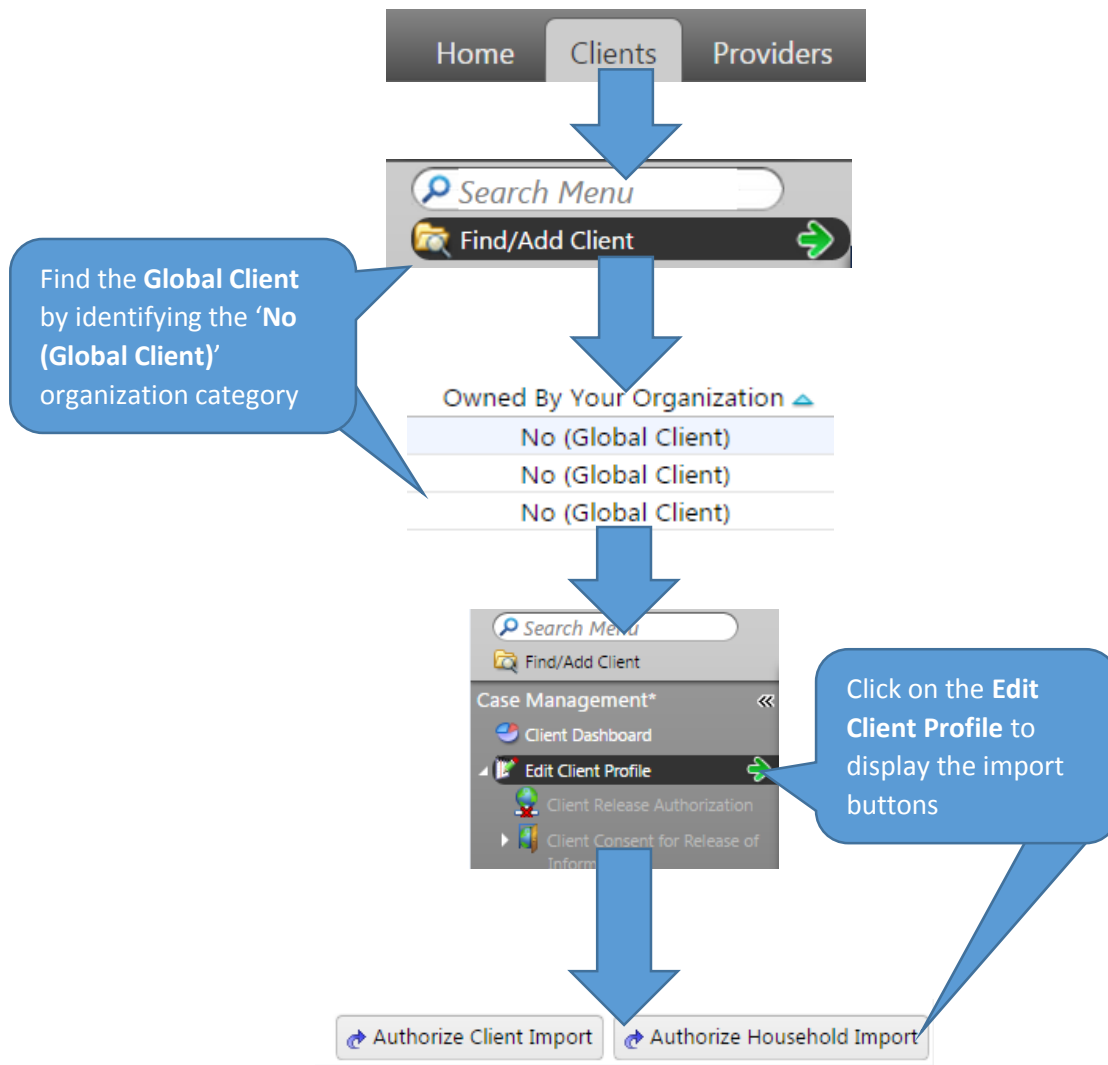
Household History

Household members can be viewed, edited and monitored if necessary.



Importing Client Information

Global Clients that need to be edited or enrolled into your organization can be imported individually, or by household, once the client has provided their authorization and a *Client Release to Agency Authorization* form has been completed.



Helpful Tip: Remember, the **Authorize Household Import** button only displays if the client has at least one other household member available for import

Household Authorization Release to Agency

Household Information

Current Client Name: Person 2, Test
Household Name: Person, Test - 82
Household Members: * ☒ Import - Person, Test ☒

Click the green check mark to select the Household Members

Organizational Information

Owning Organization: HMIS Service Agency
Release to Access Organization: DCED Lead Agency

Household Release to Agency Authorization

Authorized By Household: * Yes
Authorization Date: * 10/07/2014
Authorization Method: * Written
Household Release to Agency Upload:

Authorization to Release Records

You are hereby Authorized and requested to furnish to _____
or the representative of my household and/or agency records (including services, if any)
records, information, and documents (transcripts, reports, and/or other records)
pertaining to the records, information, and documents, and all other records
that may be pertinent to the records, information, and documents.

DATE: _____

SIGNATURE: _____

CHOOSE FILE authorization.PNG

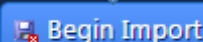
Delete Associated File

Associated File:  No Image

Release Type: * Household
Creating User: Kamrin Carver

Complete the required information and click on the **Begin Import** button

The **Choose File** button allows the user to attach the authorization document, or a photo can be taken directly from the device by clicking on the camera icon

 **Begin Import**

Household Member Import Completion

This Household Member has been imported into your agency and all transactions that are created and "shared" will be broadcasted throughout the system to other agencies that also have imported this client. Please select "Save" to complete this process and move to the next "Household Member", if applicable. When loading this client in the future you will have access to the full client profile and data collection functions along with associated shared transactions.

Import Date: 10/07/2014
Client Name: Person, Test
New Agency: DCED Lead Agency

When the import is complete, the confirmation message displays in the header

Client Release Authorization

Helpful Tip: prior to performing a client or household import you must be provided with either written or verbal authorization from that client to view their previously entered data from another organization

The diagram illustrates the workflow for Client Release Authorization. It starts with a navigation bar containing 'Home', 'Clients', and 'Providers'. A blue arrow points from 'Clients' to a 'Case Management' dropdown menu. This menu includes options: 'Client Dashboard', 'Edit Client Profile', 'Client Release Authorization' (which is highlighted), and 'Client Consent for Release of Information'. Another blue arrow points from the highlighted option to a screenshot of the 'Client Release Authorizations' page.

The 'Client Release Authorizations' page shows a table with the following data:

Client Release ID	Release Type	Client Name	Household Name	Accessing Organization	Owning Organization	Authorization Date
265	Household	Person 2, Test	Person, Test - 82	DCED Lead Agency	HMIS Service Agency	10/07/2014

A callout box points to the first row of the table, stating: "Existing Authorizations can be viewed and provide an electronic version of the import authorization for each imported client".

Client Consent for Release of Information

Helpful Tip: Each client being enrolled into a project must have a data sharing policy enacted. A signed **Client Consent / Release of Information Form** is required prior to sharing any data globally throughout the system. Until project enrollment is complete, no data sharing policy is necessary.

Home Clients Providers

Case Management

- Client Dashboard
- Edit Client Profile
- Client Release Authorization
- Client Consent for Release of Information**
- Client Consent History

Data Sharing ID: 137

Active Agreement: ☒

Agreement Name: * Clay, James

Start Date: * 10/09/2014

Expiration Date: 10/09/2021

Data Sharing Level: * Full Data Sharing

Create New Agreement

View the existing release or create a new agreement by clicking on the **Create New Agreement** button

Full Data Sharing
 -- SELECT --
 Full Data Sharing
 Partial Data Sharing
 No Data Sharing

Select the level of data sharing to be applied to the new agreement

Globally Shared Intake Elements

Full Data Sharing auto-checks each box, **Partial Data Sharing** allows for manual changes to be made & **No Data Sharing** auto un-checks each box

Client Name: ☒

Alias: ☒

Date of Birth: ☒

Social Security Number: ☒

Ethnicity: ☒

Race: ☒

Gender: ☒

Disabling Condition: ☒

Veteran Status: ☒

Place of Birth: ☒

Housing Status: ☒

Marital Status: ☒

Globally Shared Transactional Elements

Transactions relate to the client's involvement with the organization

Pre-Enrollment Screenings: ☒ ?

Project Enrollments: ☐ ?

Project Assessments: ☐ ?

Project Services: ☐ ?

Authorization/Agreement Upload

Creation Date: 10/9/2014

Created By: Brian Miller

Client: Clay, Jan

Agreement Signed: ☐


Agreement Upload:

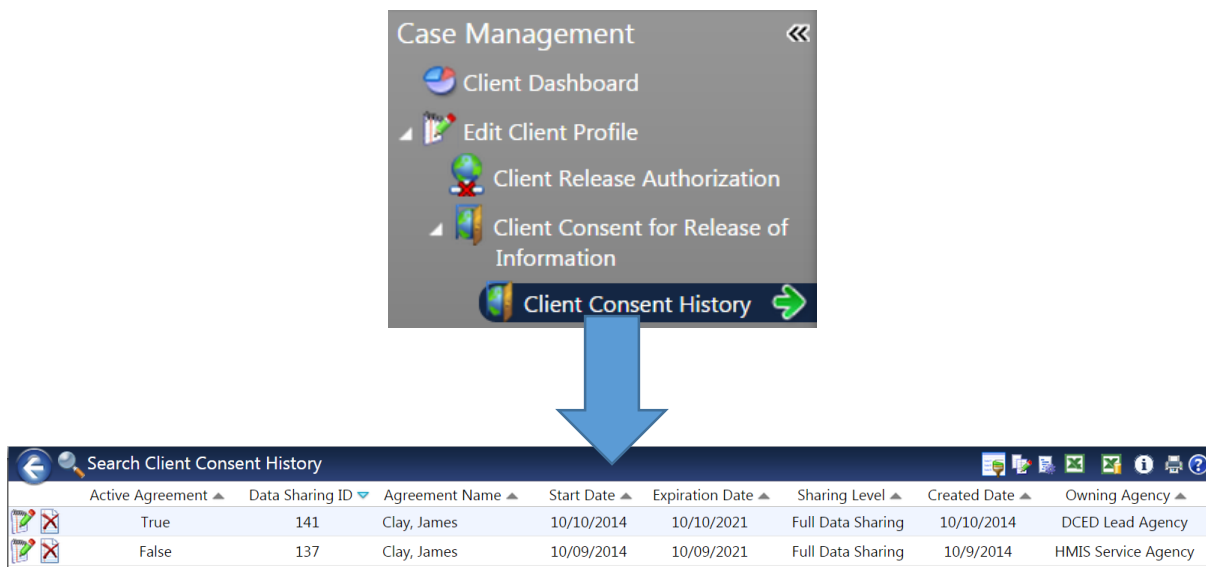
If an agreement has been signed, check the corresponding box and upload the file

No file chosen



Client Consent History

Each client consent form that has been created is viewable from the **Client Consent History** screen.

 Historical Client Consent Forms are available only in read only mode.



The screenshot shows the 'Case Management' menu with the following options: Client Dashboard, Edit Client Profile, Client Release Authorization, Client Consent for Release of Information, and Client Consent History (highlighted with a green arrow). Below the menu is a screenshot of the 'Client Consent History' table.

	Active Agreement ▲	Data Sharing ID ▼	Agreement Name ▲	Start Date ▲	Expiration Date ▲	Sharing Level ▲	Created Date ▲	Owning Agency ▲
	True	141	Clay, James	10/10/2014	10/10/2021	Full Data Sharing	10/10/2014	DCED Lead Agency
	False	137	Clay, James	10/09/2014	10/09/2021	Full Data Sharing	10/9/2014	HMIS Service Agency

Helpful Tip: The owner of the Client Consent ROI is the most recent updating agency. The release authorizations are good for seven years.
